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I. GENERAL INFORMATION

e-Grant Introduction

Every applicant is required to apply through the e-GRANT SYSTEM, including Georgia Artists Initiative and Traditional Arts Apprenticeship applicants.

This document provides all of the instructions for completing both the data entry portion of *e-Grant*, as well as the instructions for naming and uploading all other Required Attachments to the e- GRANT SYSTEM.

Throughout *e-Grant*, you will see HELP buttons. These are <u>direct links</u> to specific instructions, helpful hints, definitions, or other guidance on the type of information/data that is being requested and the appropriate format of the response.

Getting Started

Before beginning *e-Grant*, read the specific guidelines for your grant-type and have all materials ready. GCA recommends that you print out the *Application Checklist* for your specific grant-type to ensure that all required elements are uploaded to the e- GRANT SYSTEM. Then, proceed with these steps.

1. On the GCA website click on the e- GRANT SYSTEM menu tab. On that web page click on **e-GRANT SYSTEM Log-in**

2. Registration/Log-in:
   <u>First-time Users</u>: Select the Create an Account link on the main page. Enter the information requested. Enter a login and a password. An e-mail notification of successful registration will be forwarded.
   <u>Existing Accounts</u>: Enter your login name and password

   A1 Help (*LOGIN, Naming Convention*)
   A2 Help (*Password*)

3. Upon completing the login and password, the Main Menu screen appears where you may create a new application. Select 2011 GCA Grant Application from the drop down menu and then click on the "Create New Application" button. Be certain to note the Identification Number that appears under your organization's name. You will need this number to access the application from this point forward.

A3 Help (*Creating a new application*)
A4 Help (*Editing an existing application*)

4. Data Entry: Begin entry for a new application or edit an existing, incomplete application. Answer each question that is followed by an asterisk (*); these are mandatory. If the data doesn't pertain to your type of organization, the instructions advise whether to enter NA or 0 as a response.

5. Editing: You may quit and continue working on the application at any time before submission by clicking on the Save Your Work button before logging out of *e-Grant*. To resume work on the application, click on the associated grant ID number and then the Edit button the next time you login to the e-GRANT SYSTEM.

    Direct access to any of the six sections of *e-Grant* also is possible by selecting the section name from the top menu; just remember to Save Your Work before clicking on these section tabs.

II. *E-GRANT INSTRUCTIONS BY SECTION*

Section I: Grant Category   Each GCA Grant and Georgia Artists Initiative roster is listed here under its program area: Arts Services, Community Arts, Traditional Arts or Georgia Artists Initiative.

The listing of all available grant types below is for your review. e-GRANT SYSTEM offers a drop-down selection, called Choose a Grant Category. Note that only the grant type is selected, not the discipline or continuation year.

Arts Services
Operating Support Grant
Project Grant

Community Arts
Operating Support Grant
Grassroots Arts Program

Traditional Arts

Traditional Arts Apprenticeship
Georgia Artists Initiative
Touring Artist Roster
Traditional Arts Artist Roster

Section II: Contact and Eligibility

Complete each field in this section, saving each screen before moving to the next. At the bottom of each section are buttons to save entries and to navigate to the next pages. Questions with an asterisk (*****) have <u>required</u> information; e-Grant will not allow these questions to remain not answered. The HELP buttons and these instructions detail how to handle these data fields if the content is inappropriate for your application.

Question 1: GCA Relationship
Select Yes or No from the drop down menu

II-1 Help (*New Applicants*)

Question 2: Applicant Name
Provide the applicant name (whether an organization or individual applying for a roster/bank) with the <u>legal</u> name as filed with the GA Secretary of State's Office in (a). If applicable, enter the Doing-Business-As (DBA) name in (b) or NA if not applicable. Remember to use the Naming Convention instructions.

II-2 Help (*Naming Conventions*)

Question 3: General Contact Information
Provide all of the general contact information for the applicant organization or artist/artist group: street address, city, county, zip code, general telephone number, facsimile number, and website address (URL).

II-3 Help (*For Artist: Contact Information*)

Question 4: Applicant's Highest Ranking Executive Staff
Provide all of the general contact information for the highest-ranking staff person within the organization, including the name, title, direct telephone, cellular telephone, and direct email address.

II-4 Help (*Highest Ranking Staff*)

Question 5: Applicant Contact Person
If someone other than the highest-ranking Executive Staff prepared the application and is serving as the contact person and GCA has questions about the application, complete the name, title, direct telephone, and direct email address.

II-5 Help (*Identifying the Contact Person*)

Question 6: Board Chairman *
Enter the name, street address, city, zip code, direct email address, and direct telephone of the highest-ranking member of the governing authority of the organization. This address may not be the same as the applicant's address.

II-6 Help (*Board Chair*)

Question 7: Applicant Eligibility *
Nonprofits and governments must enter the Federal Employer Identification Number (FEIN). If the organization uses the FEIN of a parent organization, enter its name on line b, or if not, enter NA. Enter the applicant organization's DUNS Number, which is a requirement for all incorporated entities. Enter zero (0) in a. or c. if inappropriate for your application. Enter NA in b if inappropriate for your application.

II-7 Help (*FEIN, DUNS*)

Question 8: State Agency Eligibility
For state entities only, including colleges and universities: answer the two questions on the existence of a community advisory board and source of revenues. For others, do not answer these questions.

Question 9: College/University Eligibility
For public or private college and university applicants only: answer these two questions; others leave blank.

Question 10: NEA Required Data *
The definitions and coding in this section are supplied by the National Endowment for the Arts and used in its annual analysis of the nonprofit arts industry. Every applicant, whether a unit of government, a nonprofit, or an artist/artist group is required to

complete these questions; the answer codes allow for all to provide appropriate responses. Enter the letter/number provided with the most appropriate code response.

II-10 Help (*NEA Codes*)

Section III: Scope of Services (SOS)

Applicants for the rosters/banks and GAP do not have to complete this section or any later sections in *e-Grant*. For all other applicants, this section is <u>required</u>.

The purpose of this section is to propose the arts programming the applicant will complete by the close of the Fiscal Year for consideration in the adjudication of GCA's competitive grants. Should an award be granted, this data becomes part of the contract between the arts organization and the state of Georgia.

Question 1: Title *
Enter a title for the application. Operating Support applicants should enter "Operating Support"; Project Grant applicants should enter a short descriptive title for the application's arts programming.

III-1 Help (*Title*)

Question 2: Date of Application
Enter the inclusive or specific date(s) of the arts programming. Make certain that all dates are within State of Georgia's fiscal year from July 1 through June 30. Enter in this manner: DD/MM/YYYY – DD/MM/YYYY
.

III-2 Help (*Dates*)

Question 3: Numerical Presentation of SOS
The National Endowment for the Arts assesses national activity use from this list of arts programming types. Each type has a specific definition, which can be accessed by clicking on the HELP button or reviewing the *FY2011 Glossary*. Applicants must also estimate the size of the total audience for the arts programming included under each program type.

III-3 Help (*SOS Definitions*)
III-4 Help (*SOS Estimated Audience Instructions*)

Question 4: Living Artists *
By NEA and GCA definition, a living artist may not be a student (K-12 or college/university), but rather is a professional artist (regardless of discipline) who is (a) receiving compensation or (b) providing the artistic services in-kind. Enter the number in the field provided. If none, enter 0.

III-5 Help (*Living Artists*)

Question 5: Georgia Artists *
Georgia Artists must be resident of Georgia both at the time of this application and throughout the State of Georgia's fiscal year (July 1 – June 30). Enter the number in the field provided. If none, enter 0.

III-6 Help (*Georgia Artists*)

Question 6: GCA Roster/Bank Artists *
Enter the number of individual artists from the GCA rosters/banks (Touring Artist, Traditional Artist, Teaching Artist, Arts Education Consultants, and TPL Bank) that will be employed or contracted for the arts programming proposed in this application. If none, enter 0.

Question 7: Number of Non-Professional Artists
Non-professional artists are individuals that, despite skill level, do not make or attempt to make a living from their work.

Section IV: Budget

All Operating Support (OS) and Project Grant (PG) applicants are required to complete Section IV.   The Traditional Arts Apprenticeship (TAA) Grant budget must be completed on a separate form and uploaded through this system, but is not a part of the data entry in e-Grant.

There are four parts to this budget section: Budget Expenses, Budget Income, Three-Year Financial Comparison and the Employee & Volunteer Report. Only OS applicants complete the Three-Year Financial Comparison and the Employee & Volunteer Report.

Remember to only show expenses that are eligible under state guidelines. Enter whole dollars only and do not use commas.

Budget Expenses
Enter the total expense for each category in the Budget Expense table. Do not use a comma to separate the hundreds from the thousands. Only enter whole dollars, no cents. Only show expenses that are allowed under State of Georgia ineligibility rules. Do not include in-kind donations in this section.

Applicants should pay special attention to the center column in this chart. The required *Budget Breakdowns* requested here are to be uploaded with the other Required Attachments. Remember, the numbers reported in *e-Grant* must match the numbers in the Budget Breakdowns.

GCA strongly recommends that the applicant review the *Ineligible Expenses* discussion found in the grant Guidelines.

For Project Grant applicants only: Remember that a project is an independent program that is but one part of the applicant's annual programming. Only enter expenses (and later income) that are directly related to the project proposed in the application.

IV-1 Help (*Budget Expenses*)

Budget Income
Enter the total income for each category in the Budget Income table. Do not use a comma to separate the hundreds from the thousands.

Applicants should pay special attention to the center column in this chart. The required *Budget Breakdowns* requested here are to be uploaded with the other Required Attachments. Remember, the numbers reported in *e-Grant* must match the numbers in the Budget Breakdowns.

In the Budget Breakdown, enter a **P** for pending or a **C** for confirmed to show the status of revenues. Applicants are not penalized for revenue that is not confirmed, but the adjudication process considers the success of the applicant in deriving income from a variety of sources. Discuss the specifics of these income sources in the Budget Breakdowns attachment.

Project Grant applicants: Only enter income that is directly related to the project proposed in the application. Pro-rating expenses is acceptable, as in showing only 25% of salaries if the application project is one-quarter of the year's schedule.

IV-2 Help (*Budget Income*)

Three-Year Financial Comparison
Only Operating Support applicants are required to complete this section.

Before completing the financial comparison table, answer the two questions about the applicant organization's fiscal year. If the answer to question 28 is NO, be certain to provide the organization's fiscal year in question 29.

For lines 30-36 on the Three-Year Financial Comparison chart provide figures for last year's Actual Expenses, this year's Current Budget and next year's Projected Budget. Show deficits by using a negative number, as in -33500. Enter the total expense for each category in the 3-Year Comparison chart. Do not use a comma to separate the hundreds from the thousands. Only enter whole dollars, no cents.

Line 32: Surplus/Deficit will calculate automatically based on Operating Expenses and Income.

Line 33: Accumulated Surplus/Deficit will also calculate automatically for the Current Year and Next Year. Please be certain to enter this figure for the Previous Year.

IV-3 Help (*Three-Year Financial Comparison*)

Employee & Volunteer Report
Only Operating Support applicants are required to complete this section.

Using the columns provided, enter the number of employees and volunteers over the three years by type.   Employees are those on the organization's payroll, for whom federal income taxes are withheld. Volunteers are those who receive no compensation for their activities. Do not include outside contractors.

Section V: Attachments

STOP!

You have completed the data entry portion of *e-Grant*, but **DO NOT SUBMIT** it now, unless you have completed the entire application including all of the Required Attachments (such as but not limited to: Budget Breakdowns, Narrative, Board List); these must be submitted at the same time as you submit *e-Grant* into the e-GRANT SYSTEM.

Once you submit, you are unable to edit or add information!
Click on the Save Your Work button until you have all elements ready to upload.

1. **Check e-Grant**
   When you have completed data entry in *e-Grant*, click on the FINISH button located on the top, right menu of the e-GRANT SYSTEM screen. The system will list all data fields which have not been completed and which are required. Click on the GO FIX IT button for each item listed. This will take you directly to the error, so that corrections can be made.

   Continue this process until all corrections have been made and the e-GRANT SYSTEM allows you to move forward, where submission can occur.

2. **Assemble the Required Attachments for Uploading**
   a. Print the **Grant Application Checklist**, if you haven't already done so. You need this reference document to ensure that the correct elements are in the correct order before submission. Not every GCA grant requires the same documentation, so this step is vital to a successful submission. GCA recommends that you check-off each item as you prepare and include it in a correctly named underline attachment on your computer, ready for the upload.
   b. Make certain that each of the combined documents is complete and accurate. You will not be able to edit them once they have been submitted into the e-GRANT SYSTEM. Content uploaded into the system must be either created or transferred into MS Word, Rich Text, PDF or MS Excel.
   c. Assemble the Required Attachments into a maximum of **three documents, attachments A-C.** Create these documents, using the same naming convention rules that created your organization's name for *e-Grant*, and save each. Each attachment should be named as follows:

- *Organization Name, Attachment A* (.xls)
- *Organization Name, Attachment B* (.doc, .pdf, .rtf)
- *Organization Name, Attachment C*

d. Use each "browse" button to locate the required attachment document on your computer and upload it into the e-GRANT SYSTEM.

e. Once you have uploaded the necessary files, hit the SAVE YOUR WORK button. You will now see that next to each attachment there are options to either DELETE or VIEW. GCA strongly recommends that you review the attachments for all required information before hitting SAVE & NEXT and proceeding to the signature page and final submission

f. Once you have reviewed all attachments for their completeness, click on the SAVE & NEXT button to proceed to the Signature page and submit *e-Grant*.

Section VI: Signature & Submission

GCA has eliminated the separate Legal Assurances Form from the application Guidelines and has replaced it with the legal assurances statement in the last section of e-Grant. Applicants must read this statement and provide two electronic signatures by the organization's leadership. The individuals signing this application must receive mail at different addresses. With their signatures, each affirms that the information contained within the application is true and correct, to the best of his/her knowledge.

Signatures will be accepted in the following format:
backslash (\) followed by the signatory's legal name
ex. \Jane Smith

Once all attachments have been verified as correct and complete and the required signatures have been entered, click on the FINISH button at the top of the screen. *e-Grant* will notify you if corrections need to be made to the data entry portion of the system. Once all corrections have been made, click on the SAVE & NEXT button to proceed to the submission screen.

On the final e-Grant screen click on the SUBMIT MY DATA button to submit your application to GCA. If you do not click on the SUBMIT MY DATA button the application will not be submitted and

will not be considered for review. Be certain to submit *e-Grant* prior to 4:45PM on the deadline date.

III. FREQUENTLY ASKED QUESTIONS

Where are the GCA Grant Guidelines?

During *e-Grant* data entry, and after clicking on Save Your Work, select the Main Menu button at the top of the screen, click on the blue Guidelines action icon. To return to data entry, simply close the Guidelines icon X, and the *e-Grant* action icons will reappear; click on Edit. In addition, the **HELP** button will access specific guidance for the data field it is connected to.

How do I view a summary of the entries completed?

Save the work and go to the Main Menu. To review all entries, click on the View action icon. You may then click on Print Your Application; this opens a new window, which contains a summary of the application to date.

How do I make changes to an application?

Click the Edit button on the action icons row. You will be taken to the first screen of the application. From here you can edit, view, make changes, and/or submit the application.

How do I upload the Required Attachments?

On the Verification & Submission button, find the location for uploading the Required Attachments. Click on the Browse button and locate and select the appropriate attachment from your computer. Repeat this step for each of the other types of Required Attachments. Be certain to use the appropriate naming conventions (see above).

How do I submit the application?

e-Grant must <u>not be submitted</u> until the <u>entire</u> application has been prepared and saved in your computer with the proper naming convention and in the proper order as prescribed in the Application Checklist for the grant type you are completing.

a. Your first option is to read through each screen of the application to review the entries and then click on Verification & Submission button.

b. The second option is to select the Verification & Submission button from the top menu of the main page.

e-Grant will not allow you to submit an incomplete application; you will be instructed to go back and fill in any missing information. Select the Go Fix It button for each error, until no errors remain.

How do I delete an application?

Only delete an application that you will not submit. Click on the Delete button from the action icons. After confirming the deletion, the application will be removed from your list of open applications. Open applications are those that have not been submitted.